

Daily Market Report

31 August 2021

JSE

JSE All-Share Index decreased by 0.86% to close at 67,064.69 points on Monday, as Industrial and Resources sector recorded losses.

BRVM

BRVM Composite Index closed at 175.59 points, up by 0.18% on Monday with Bollore Transport & Logistics and Palm Côte d'Ivoire being the top gainers.

NSE

NSE All-Share decreased by 0.40% to close at 39326.67 points on Monday, as the Industrial sector, Banking sector and Oil and gas sectors recorded losses.

EGX

EGX 30 Index increased by 0.45% and closed at 11,163.23 points on Monday, as the market gained LE 667.57 million of market cap, amid Arab and foreign buying.

ESG

Casablanca ESG 10 Index closed at 960.39 points on Monday, as it declined by 0.12%.

African Markets

Nigeria: NSE 30 Index declined by 0.44% and closed at 1,622.06 points on Monday. Ecobank and Dangote Cement were the top losers.

Egypt: EGX 30 Index increased by 0.45% and closed at 11,163.23 points on Monday, as the market gained LE 667.57 million of market cap, amid Arab and foreign buying.

Kenya: NSE 20 Index declined by 0.11% and closed at 2,032.02 points on Monday. Kengen and Centum Investment Company were the top losers.

South Africa: JSE Top 40 Index fell by 1.05% to close at 60,750.09 points on Monday, as the Industrial and Resources sectors recorded losses.

Capital Markets

JSE Johannesburg Stock Exchange ▼ 0.86%

BRVM Bourse Régionale des Valeurs Mobilières ▲ 0.10%

NSE Nigerian Stock Exchange ▼ 0.40%

EGX Egyptian Stock Exchange ▲ 0.45%

ESG Casablanca Stock Exchange ▼ 0.12%

Nigeria Key Indicators

	Current
Inflation	17.38%
Exchange Rate	₦ 410.29
INTERBANK RATES	
OBB	6.50 ▼
Overnight	7.17 ▼

Other Emerging Markets

Abu Dhabi: ADX General increased 0.43% to close at 7684.87 points on Monday, as Etisalat and First Abu Dhabi Bank recorded gains. MSCI UAE Index increased by 0.26% and closed at 403 76 points.

Vietnam: VN-30 Index increased by 0.88% to close at 1,431.05 points on Monday, as the blue-chip companies recorded gains. MSCI Vietnam rose by 0.35% to close at 1011.66 points.

Saudi Arabia: Tadawul All Share Index increased by 0.67% to close at 11,255.05 points on Monday, as gains in the Media & Publishing, Retail and Telecoms & IT sectors led shares higher. MSCI Tadawul 30 Index rose 0.76% to close at 1,521.07 points.

India: Nifty 50 market increased by 1.35% to close at 16,931.05 points on Monday, as gains in the Metals, Power and Green Energy sectors propelled shares higher. MSCI Nifty 50 Index rose 1.44% to close at 1,971.65 points.

News

Nigeria:

Digital Currency Gains Traction as CBN Appoints Technical Partner
Zenith Bank Shows Resilience, Grows H1 Profit By 3% to N117bn
Naira falls to all-time low of 527 against dollar

Kenya:

NCBA profit up 76pc on rise in lending income
NCBA, Stanbic, Co-op bag Sh31 billion pension deal
Standard Group's Half-Year Loss Narrows to KSh61.2 Million

Abu Dhabi:

NMC says 7-month earnings of \$120m beat estimates
Etisalat, GMIS to accelerate 5G deployment, industrial growth
EGA records Dh1.74 billion H1 profit as global aluminium demand soars

Saudi Arabia:

Saudi Arabia's non-oil exports jump 52% to \$17.5bln in Q2 2021
Investment plans follow Tanmiah Food's IPO
Saudi mortgage lending picks up in July 2021

Egypt:

Egypt's external debt jumps to \$134.8 bln by end of 3Q of FY2020/21: CBE
CBE approves aiBANK acquisition by EFG Hermes, Sovereign Fund
HD Bank consolidated profit down in H1-21

South Africa:

Eskom Considers \$7.2 Billion Spend on Wind, Solar by 2030
Discovery sets up R2bn provision for Covid-19 claims
Prosus drops 3.5% after China slashes gaming time for children

India:

Business activity continues to rise, now well above pre-pandemic levels
PhonePe gets insurance broking licence
NTPC gears up to meet rising power demand; generation up 23 pc

Vietnam:

August retail sales plunge as COVID-19 cases on rise
HCM City's CPI up 0.33 percent in August
HCM City offers tax breaks to household businesses hit by COVID

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,684.87	0.4%	0.8%	3.9%	52.3%	AED/USD	3.67	0.0%	0.0%
Egypt	11,163.23	0.4%	0.3%	3.3%	2.9%	EGP/USD	15.70	0.0%	-0.2%
India	16,931.05	1.4%	1.4%	7.4%	21.1%	INR/USD	73.28	-0.6%	0.3%
Kenya	2,032.02	-0.1%	-0.1%	2.9%	8.8%	KES/USD	109.85	0.0%	0.6%
Nigeria	1,622.06	-0.4%	-0.4%	-1.0%	-1.1%	NGN/USD	412.00	0.1%	4.4%
Saudi Arabia	11,255.05	0.7%	1.1%	1.7%	29.5%	SAR/USD	3.75	0.0%	0.0%
South Africa	60,750.09	-1.0%	-1.0%	-3.3%	11.7%	ZAR/USD	14.60	-1.0%	-0.6%
Vietnam	1,431.05	0.9%	0.9%	-1.1%	33.6%	VND/USD	22,777.50	-0.1%	-1.3%

MSCI Emerging Markets

MSCI Frontier	659.89	0.1%	0.1%	2.8%	15.4%	Brent Crude (\$)	73.41	1.0%	41.7%
MSCI Frontier 100	1,490.24	0.1%	0.1%	3.6%	18.5%	Gold (\$)	1,812.20	-0.4%	-4.4%
MSCI Emerging	1,285.39	1.0%	1.0%	0.6%	-0.5%	Copper (\$)	9,423.60	0.1%	21.3%
MSCI World (USD)	3,146.63	0.4%	0.4%	2.5%	17.0%	Coffee (\$)	165.56	0.7%	38.9%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Presco	79.50	8.9%	12.1%	23.58	Ecobank	5.25	-3.7%	-12.5%	19.46
Nigerian Breweries	54.90	5.6%	-2.0%	14.95	Dangote Cement	243.00	-2.6%	-0.8%	64.95
UBN	5.35	4.9%	0.0%	2.45	Transnational Corporation	0.90	-2.2%	0.0%	46.84
Axamansard	0.88	1.1%	-16.2%	3.68	Access	9.00	-1.1%	6.5%	70.20
Wema	0.90	1.1%	30.4%	1.73	FCMB	3.05	-0.7%	-8.4%	5.67
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
UACN	11.05	11.05	0.0%	19.86	UBN	5.35	4.65	15.1%	2.45
Transcorp Hotels	4.70	4.70	0.0%	0.00	Cap	19.50	15.25	27.9%	1.12
Total	199.20	199.20	0.0%	25.43	Unilever	13.50	10.50	28.6%	9.10
Seplat Petroleum	759.70	759.70	0.0%	0.20	Ecobank	5.25	3.90	34.6%	19.46
Okomu Oil	110.00	110.00	0.0%	8.52	Cadbury	8.50	6.30	34.9%	0.58

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Easylease motorcycle rentals	50.60	15.0%	187.5%	4.58	Abu Dhabi National Hotels	4.15	-1.7%	48.2%	0.24
Zee Store Prjsc	26.16	14.9%	149.1%	0.98	Methaq Takaful Ins.	0.86	-1.6%	-0.8%	1.61
Palms Sports	17.24	14.9%	30.6%	22.67	Eshraq Investments	0.34	-1.5%	6.3%	3.88
Esg Emirates Stallions Group	7.03	14.9%	69.0%	4.36	RAK Co. for White Cement & Construction	0.98	-1.3%	14.8%	0.45
Gulf Pharmaceutical Ind.	2.09	14.8%	57.1%	16.63	National Bank of Ras Al Khaimah	3.85	-1.3%	-1.3%	0.30
Stocks near 52 w high	Last Price	52w H	% Change	Value(mn DH)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mnDH)
Al Buhaira Ntl Ins.	1.79	1.79	0.0%	0.00	Insurance House	0.79	0.79	0.0%	0.00
Easy Lease Motor Cycle Rental PSC	50.60	50.60	0.0%	5.18	Al Ain Ahlia Ins.	29.20	29.20	0.0%	0.00
Zee Stores PJSC	26.16	26.16	0.0%	0.98	Commercial Bank Intl	0.63	0.63	0.0%	0.00
Sawaeed Holding PJSC	7.05	7.05	0.0%	0.00	National Bank of Fujairah	4.98	4.98	0.0%	0.00
Invest Bank PSC	0.45	0.45	0.0%	0.00	Sharjah Insurance	1.44	1.44	0.0%	0.00

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
GB AUTO	5.89	5.6%	77.4%	84.93	Medinet Nasr Housing	80.92	-3.3%	2018.3%	6.09
Citadel Capital - Common Shares	4.65	4.7%	223.6%	48.44	Misr Fertilizers Production- Mopco	7.74	-3.1%	-86.8%	15.57
Eastern Company	12.53	3.4%	-3.9%	44.34	Ezz Steel	15.45	-2.7%	44.0%	49.09
Oriental Weavers	1.97	2.8%	-71.2%	nse	Egyptian Financial Group-Hermes	2.55	-2.3%	-82.6%	67.34
Cairo For Investment And Real Estate Development	1.30	2.5%	-90.9%	23.79	Sidi Kerir Petrochemicals	2.20	-2.2%	-76.4%	20.80
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn E£)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn E£)
Telecom Egypt	14.74	14.74	0.0%	4.91	Cairo For Investment And Real Estate Devp	1.30	1.30	0.0%	23.79
Raya Holding For Financial Investments	10.70	10.70	0.0%	24.34	Commercial International Bank(Egypt)	26.79	26.79	0.0%	16.38
Pioneers Holding	2.81	2.81	0.0%	3.75	Credit Agricole Egypt	11.65	11.65	0.0%	5.20
Oriental Weavers	1.97	1.97	0.0%	33.78	Egyptian Financial Group-Hermes	2.55	2.55	0.0%	67.34
MM Group For Industry AndInternational Trade	5.14	5.14	0.0%	3.45	Fawry For Banking TechnologyAnd Electronic Payment	4.06	4.06	0.0%	4.10

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Bharti Airtel	625.00	5.0%	22.6%	24135.382	Tech Mahindra	1424.80	-1.4%	46.4%	3919.32
Divi's Laboratories Limited	5119.00	4.2%	33.2%	4383.24	Eicher Motors	2547.55	-1.1%	0.7%	2378.73
Axis Bank	782.75	4.0%	26.2%	9697.81	Nestle India Limited	19736.00	-1.1%	7.3%	2657.40
Tata Steel	1436.70	3.8%	123.2%	19231.66	Infosys	1699.85	-0.5%	35.4%	11157.08
Coal India	143.30	3.4%	5.8%	1612.44	Wipro	632.05	-0.5%	63.6%	2771.14
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Britannia Inds.	3984.00	3993.55	-0.2%	1851.80	Hero Motocorp	2724.00	2636.00	3.3%	1406.97
Divi's Laboratories Limited	5119.00	5133.95	-0.3%	4383.24	Maruti Suzuki India	6802.00	6270.15	8.5%	5533.50
Tata Consumer products Ltd.	859.00	862.75	-0.4%	1608.22	Dr Reddys Lab	4680.20	4135.00	13.2%	2929.11
Icici Bank	714.00	717.40	-0.5%	7656.55	Britannia Inds.	3984.00	3317.30	20.1%	1851.80
Bajaj Finance	7151.05	7197.00	-0.6%	10727.07	Reliance Industries	2273.75	1830.00	24.2%	14638.11

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
NCBA Group Plc	27.60	4.3%	3.2%	4.29	Kengen Limited	4.68	-4.9%	-0.6%	0.51
Nairobi Securities Exchange Plc	10.10	1.6%	23.8%	0.02	Centum Investment Company Plc	16.70	-2.1%	4.0%	1.29
Diamond Trust Bank Limited	65.50	0.4%	-12.7%	0.41	Total Kenya Ltd	25.55	-1.7%	6.5%	0.14
Stanbic Holdings	95.25	0.3%	12.1%	0.05	Safaricom Plc	43.70	-1.5%	27.6%	26.85
KCB Group Plc	48.65	0.2%	27.7%	3.10	Bamburi Cement Limited	37.50	-1.3%	-0.9%	48.63
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn KSh)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn KSh)
Absa Bank Kenya	11.00	11.15	-1.3%	2.50	WPP Scangroup Plc	3.57	3.50	2.0%	9.19
NCBA Group Plc	27.60	28.00	-1.4%	4.29	Standard Chartered Bank Kenya Ltd	140.00	127.00	10.2%	1.71
Equity Group Holdings Plc	54.00	55.00	-1.8%	83.59	Diamond Trust Bank Limited	65.50	57.50	13.9%	0.41
The Cooperative Bank of Kenya Ltd	13.75	14.05	-2.1%	1.98	Centum Investment Company Plc	16.70	14.05	18.9%	1.29
Safaricom Plc	43.70	45.25	-3.4%	26.85	Kenya Power & Lighting Limited	1.39	1.16	19.8%	0.32

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Al-Jouf Agricultural Development Co.	78.70	9.9%	114.4%	275.91	Saudi Steel Pipe Co.	30.55	-1.5%	9.7%	22.09
Tabuk Agricultural Development Co.	38.95	8.8%	20.2%	178.53	Abdulmohsen Alhokair Group for Tourism and Development	24.14	-1.3%	14.0%	21.06
United Electronics Co.	144.20	5.6%	66.7%	67.87	Eastern Province Cement Co.	51.30	-1.2%	24.7%	2.09
Middle East Paper Co.	39.50	5.3%	104.5%	196.95	Southern Province Cement Co.	74.20	-0.9%	-12.0%	19.87
Al Gassim Investment Holding Co.	30.95	5.3%	59.9%	54.29	Arabian Pipes Co.	19.22	-0.8%	7.1%	60.48
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn SAR)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn SAR)
Theeb Rent a Car Co	66.60	66.60	0.0%	24.36	Ntl Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
The Saudi National Bank	60.00	60.00	0.0%	172.35	BinDawood Holding Co.	108.20	105.60	2.5%	7.05
Zamil Industrial Investment Co.	37.55	37.55	0.0%	46.67	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United International Transportation Co.	51.30	51.30	0.0%	10.96	Savola Group	39.85	36.60	8.9%	12.81
United Electronics Co.	144.20	144.20	0.0%	67.87	Saudi Airlines Catering Co.	81.50	70.50	15.6%	39.53

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Redefine Properties	437.00	2.1%	31.2%	2856.52	Prosus (JSE)	120403.00	-3.5%	-25.0%	163061.30
Vodacom Group	14113.00	1.3%	13.5%	4810.99	Gold Fields	13559.00	-3.0%	-1.4%	13438.19
Spar Group	20500.00	1.2%	8.2%	3266.37	Naspers Ltd	233001.00	-3.0%	-22.8%	188072.82
Shoprite Limited	18022.00	1.1%	28.7%	10979.31	Anglo American Platinum	162362.00	-2.4%	19.4%	19917.92
Investec Plc	6122.00	0.8%	67.1%	4094.94	ABSA Group	15410.00	-2.4%	28.6%	24204.63
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn R)	Stocks near 52 w Low	Last Price	52w L	% Change	Val(mn R)
Investec Plc	6122.00	6159.00	-0.6%	4094.94	Naspers Ltd	233001.00	229087.00	1.7%	188072.82
Standard Bank Group	14613.00	14708.00	-0.6%	16811.72	Prosus (JSE)	120403.00	114101.00	5.5%	163061.30
Investec Ltd (JSE)	6119.00	6159.00	-0.6%	1981.06	Brit.Amer.Tobacco	54705.00	50757.00	7.8%	8710.08
Firstrand Ltd	6051.00	6102.00	-0.8%	51323.32	Anglogold Ashanti	24377.00	22600.00	7.9%	12117.27
Aspen Phmc.Hdg.	19148.00	19341.00	-1.0%	6477.88	Gold Fields	13559.00	12193.00	11.2%	13438.19

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Vietnam JSC Bank	32300.00	3.7%	20.7%	420394.62	Mobile World Inv. Corp	110600.00	-32.8%	-7.0%	141.078.37
BaoViet Holdings	55000.00	3.0%	-16.7%	79825.65	Masan Group Corp	132600.00	-2.4%	50.4%	364.603.32
Techcombank	49200.00	2.4%	191.1%	597900.22	Saigon Beer Alcohol Beverage Corp.	147200.00	-0.9%	-24.5%	17441.83
Hoa Phat Group JSC	48700.00	2.3%	59.5%	822187.65	Vingroup JSC	94100.00	-0.7%	-3.9%	133942.97
Sai Gon Thuong Tin Commercial	27900.00	2.2%	-14.1%	323.771.96	Vinhomes	106900.00	0.0%	298.9%	938879.38
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn đ)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn đ)
Vietnam Prosperity	61600.00	61600.00	0.0%	251.273.46	Hoa Phat Group	48700.00	48700.00	0.0%	822187.65
Vietjet Aviation	126900.00	126900.00	0.0%	154727.52	Khang Dien House Trading & Investment	39500.00	39500.00	0.0%	50.062.49
Vingroup JSC	94100.00	94100.00	0.0%	133942.97	Military Commercial Bank	28400.00	28400.00	0.0%	448424.78
Vinhomes	106900.00	106900.00	0.0%	938879.38	Vietnam National Petroleum Group	49550.00	49550.00	0.0%	41.227.47
Techcombank	49200.00	49200.00	0.0%	597900.22	PetroVietnam Power Corp	11950.00	11950.00	0.0%	157464.13

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